



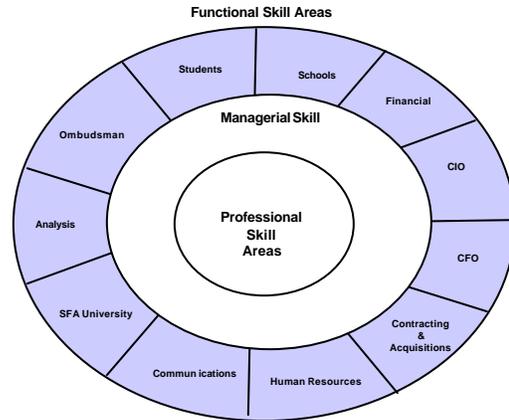
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Financial Partners Skill Catalog

Financial Partners Channel

Functional Skills List:

- Contract Management
- Office Administration
- Oversight and Compliance
- Payments Processing
- Planning and Budgeting
- Risk Modeling
- Technical Assistance
- Technology Planning





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Contract Management

Manages and monitors operating partners performance in accordance with government policies and procedures.

Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of the contract management vision of SFA
- Applies contract management vision to develop, sustain and improve relations with contractors/vendors in order to meet SFA’s objectives
- Demonstrates understanding of federal contract management concepts, procedures and regulations
- Ensures compliance with government contracting regulations
- Demonstrates ability to develop, manage and monitor effective memorandums of understanding with vendors and third party service providers
- Demonstrates skill in working with vendors to lower costs associated with technology and processes
- Demonstrates ability to monitor progress and ensures vendor/contractor adheres to standards and expected outcomes

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Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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Office Administration

Performs administrative practices and support services to increase office effectiveness and efficiency.

Meets Expectations

Exhibits 3 of the 5 behaviors listed for the "Meets Expectations" standard:

- **Demonstrates ability to organize, plan and coordinate administrative functions**
- **Demonstrates ability to identify administrative procedural problems and recommend improvements that increase effectiveness and efficiency**
- **Uses knowledge of administration concepts and practices (answering phones, filing, scheduling, etc.) to plan, deliver and manage support services vital to SFA operations**

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Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the "Meets Expectations" standard.



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Oversight and Compliance

Applies understanding of oversight and compliance program guidelines and regulations to examine, measure, and monitor program procedures and finances.

Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates an understanding of SFA’s oversight role
- Demonstrates an understanding of oversight and compliance program guidelines and regulations
- Applies program guidelines and regulations to examine, measure and monitor program participation procedures and finances to ensure compliance

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Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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Payments Processing

Prepares, compiles and analyzes financial transaction data for payment processing.

Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of payment process
- Demonstrates ability to monitor and respond to issues throughout payment process
- Demonstrates ability to write queries to prepare and compile financial transaction data and analyze trends to advise senior management
- Demonstrates ability to initiate and maintain program and system changes to electronic Financial Management System (FMS)

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Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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Planning and Budgeting

Uses rules, appropriate information sources and tools to ensure accurate and timely reporting of business forecasts and budgets.

Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of OMB regulations and overall Federal appropriations process
- Demonstrates understanding of rules, information sources and tools available to prepare and consolidate budgets and forecasts
- Demonstrates understanding of departmental and organizational budget formulation and fund control procedures and guidelines
- Demonstrates ability to apply planning and budgeting concepts ensuring accurate and timely reporting of business forecasts and budgets
- Analyzes and discusses budget implications
- Demonstrates ability to track and reconcile unit budget activities

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Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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Risk Modeling

Applies understanding of the concept and organization value of risk modeling to prevent and reduce losses arising from high-risk ventures.

Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of the concept and organizational value of risk modeling
- Demonstrates ability to develop systematic and comprehensive risk modeling programs that detect, prevent and reduce losses arising from high risk ventures

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Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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Technical Assistance

Applies customer support principles to respond to customer inquiries. Develops and implements training and educational programs to meet customer needs.

Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of impact of customer support on customer satisfaction and applies appropriate customer support principles related to SFA software and systems
- Demonstrates skill in providing complete, accurate and real-time support to customer inquiries about SFA software and systems
- Identifies customer needs and develops and implements appropriate training or educational programs to serve the customer

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Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.



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Technology Planning

Applies understanding of strategic IT goals and initiatives to identify service improvement and cost reduction opportunities.

Meets Expectations

Exhibits 3 of the 5 behaviors listed for the “Meets Expectations” standard:

- Demonstrates understanding of strategic IT goals and objectives
- Demonstrates ability to apply strategic investment priorities to select IT initiatives that best support organizational goals and objectives
- Demonstrates understanding of IT initiative evaluation process
- Evaluates business process and technical requirements to identify service improvement and cost reduction opportunities
- Monitors emerging technologies and business process innovations to analyze their potential for streamlining SFA operations

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Improvement Required

Exhibits less than 3 of the 5 behaviors listed for the “Meets Expectations” standard.